

Appendix IV. Accessing the Monthly SS/SSI Reports

The TASS Online System allows users to access Benefit History and Income Discrepancy Reports generated from the monthly Social Security and Supplemental Security Income match conducted by TASS for households due for re-certification in the next four months. The system also allows users to access Error Reports, which identify tenants whose identity could not be validated and the reason for the lack of validation, and No SS/SSI Benefit Reports, which identify tenants whose identity was verified but do not and have never received SS/SSI benefits.

The **Benefit History Report** shows the current level of benefits and a history (up to the last 8 changes) for each family member. The Benefit History Reports are generated for all family members with validated personal identifiers in households due for re-certification in the indicated month and who currently receive or previously received SS/SSI benefits.

The **Income Discrepancy Report** is generated for households due for re-certification and having a discrepancy between the monthly SS/SSI benefit amount reported by SSA and that reported by the household. The household is considered discrepant if the combined tenant-reported amount for all household members differs from the SSA-reported amount by \$50 or more.

The **Error Report** provides information on family members in a household due for re-certification for whom SSA was unable to provide benefit information and the issues encountered by SSA in resolving the tenant information.

The **No SS/SSI Benefit Report** provides a list of the tenants whose identity was verified by SSA based on the SSN/Last Name/Date of Birth combination. However, the tenants do not and have never received SS/SSI benefits.

The reports that are available to the user are determined by the POAs that have been assigned to the user by the Secure Systems Coordinator. A PHA user may search for and view reports by two criteria: PHA or Household. An O/A user may search for and view reports by three criteria: Household, FHA Project Number or FHA Contract Number.

Sections A, B, C, and D of this Appendix describe how to search for the monthly reports by household, PHA, FHA Contract Number, and FHA Project Number respectively. Section E describes how to access the detailed Benefit History and Income Discrepancy reports generated in the search results.



A. Accessing Monthly Reports by Household

TASS allows the user to request tenant benefit records for a specific household using the Head of Household's (HoH) Social Security Number (SSN). A search by HoH SSN will yield, at most, one record because the SSN identifies only one specific household. Use the following steps to search by household:

1. Click the **by household** link under the Benefit History Reports section of the system menu.

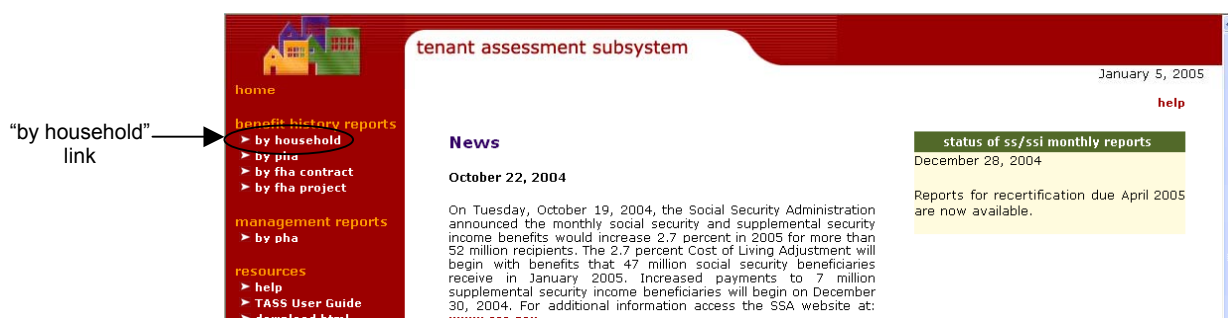


Figure 10. TASS Home Page



Note

POAs may not view the tenant data without a signed Authorization for the Release of Information/Privacy Act Notice (Forms HUD-9886, HUD-9887, or HUD-9887A) in the household's file for the head of household and spouse or co-head, regardless of age, and each adult member in the household.

2. The **Monthly Reports by Household** screen is displayed as shown below.

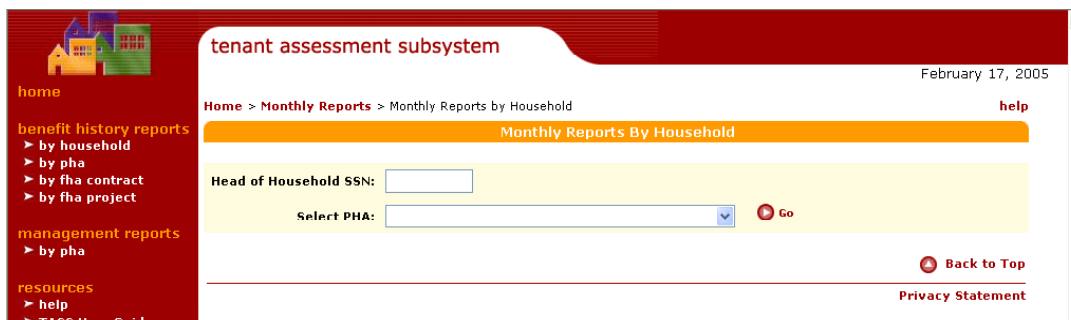
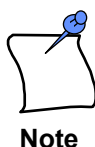


Figure 11. Monthly Reports by Household Search Screen



3. To specify the household for which you want to access the benefit records:
 - Enter the **HoH SSN** in the text box. (Do not include dashes in the SSN.)
 - Select a **PHA** from the drop-down list of authorized PHAs
 - Click the **Go** link



Note

Instead of a list of PHAs, an O/A user would be presented with drop-down lists of the Project and/or Contract Numbers they are authorized to access.

If a PHA, Project, or Contract that you need to access does not appear in the drop-down list of authorized PHAs/Projects/Contracts, you should contact the Secure Systems Coordinator of your POA, who is able to grant you the necessary rights.

4. The **Household Income Summary** for the household is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Household > Summary by Household [help](#)

Household Income Summary

PHA	Re-certification Month
'LA001' - Housing Authority of New Orleans	December, 2004

HH SSN: 002-06-5747 | HH Name: W***** TAY***** | [View Benefit History](#)

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
002-06-5747	W***** TAY*****	\$794.00 \$794.00	\$0.00	\$0.00	\$794.00 \$794.00
001-79-2085	D***** TAY*****	\$211.00 \$211.00	\$0.00	\$0.00	\$211.00 \$211.00

Member SSN	Member Name	Error Description
001-22-1371	T***** TAY*****	No benefits reported by SSA
000-20-8562	G***** TAY*****	No benefits reported by SSA

[Back to Top](#)

Link to Benefit History Reports

Figure 12. Household Income Summary Screen

The screen shows the following summary benefit amounts for each family member:

- Gross and Net Monthly Social Security (SS)
 - Supplemental Security Income (SSI)—including Federal and State
 - Dual Entitlement (DE)
 - Combined (SS, SSI, and DE) Gross and Net
5. Click on the **View Benefit History** link to view the detailed Benefit History Report(s) for the household members. The Benefit History Report(s) for the household are displayed as shown below. The reports describe the Social Security, Supplemental Security Income, Medicare, Dual Entitlement, and Black Lung benefits being received



by the tenant. It also provides a history of past benefit amounts up to the last eight changes.

The reports are sorted by Member Number. Scroll down the page to view the individual reports for each family member. A sample Benefit History Report is shown in Appendices V (PHA) and VI (O/A). Appendix VII contains a description of the data shown on the report.

BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2004/12] **FOR OFFICIAL USE ONLY**			
HA Code: LA001	Housing Authority: Housing Authority of New Orleans		
Project:	Program Type: Sec.8 Housing Choice Vouchers		
[For Reference Only]			
Head of Household:	W***** TAY*****	Address:	2334 CONTI ST NEW ORLEANS LA 70119-0000
SSN:	002-06-5747		
[Information below applies to this family member]			
Head of Household:	002-06-5747		
Family Member:	W***** TAY*****		
SSN:	002-06-5747	Date of Birth:	05/01/1948
Social Security Income Benefits			
Payment Status Code:	C - Current Payment Status	Benefit History	
Date of Current Entitlement:	09/1991	Date	Gross Benefit
Net Monthly Benefit if Payable:	\$794.00	12/2003	\$794.00 Credited
		12/2002	\$777.00 Credited

Figure 13. Benefit History Report Screen

- If an Income Discrepancy Report has been generated for the household, the screen will display a link to the report as shown below.

Management reports by pha SOURCES help TASS User Guide download html errors about income verification reac	HH SSN: 001-64-8711 HH Name: B**** MCC***** View Benefit History View Income Discrepancy					
	Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
	001-64-0711	D**** MCC*****	\$0.00 \$0.00	\$564.00	\$0.00	\$564.00 \$564.00
	000-20-4177	T***** MCC*****	\$0.00 \$0.00	\$564.00	\$0.00	\$564.00 \$564.00
	Back to Top Privacy Statement					

Link to the
Income
Discrepancy
Report

Figure 14. Household Income Summary screen with Income Discrepancy Report link

- Click on the **View Income Discrepancy** link to view the detailed Income Discrepancy Report for the household. The Income Discrepancy Report for the household is displayed as shown below. The report details the tenant-reported benefit amount, the SSA-reported benefit amount, and the difference in the amounts for each family member and for the combined household.

A sample Income Discrepancy Report is shown in Appendices VIII (PHAs) and IX (O/As). Appendix X contains a description of the data shown on the report.



INCOME DISCREPANCY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2004/12]		
FOR OFFICIAL USE ONLY		
HA Code: LA001	Housing Authority:	Housing Authority of New Orleans
Project:	Program Type:	Sec.8 Certificates
Head of Household:	MIL*****	Address: 2522 LOUISA ST NEW ORLEANS LA 70117-0000
SSN:	001-69-6548	
Family Member:		
SSN	Name	Date of Birth
001-69-6548	MIL*****	11/20/1964
002-56-8051	JOH*****	01/20/1983
Benefits Reported to HUD		
No Benefits Reported to HUD		
Benefits Reported by SSA		

Figure 15. Income Discrepancy Report Screen

- If there is no household in the selected PHA, Project, or Contract with a Head of Household SSN that matches the one entered by the user, the screen will display a message as shown below.

tenant assessment subsystem

July 23, 2003

Home > Monthly Reports > Monthly Reports by Household > Summary by Household

help

Household Income Summary	
PHA	'LA001' - HOUSING AUTHORITY OF NEW ORLEANS
Re-certification Month	No record found for HH SSN: 123456789

Back to Top

Privacy Statement

home

benefit history reports

- by household
- by pha
- by pha contract
- by pha project

field reviews

resources

- help
- download.html

"No record found" message

Figure 16. "No Record Found" Screen

Verify that you correctly entered the Head of Household SSN, selected the appropriate PHA, Project, or Contract and that the household is due for re-certification within the current or next four months.



Note

There may be no Benefit History Reports available for a household or a family member because of the following reasons:

- A HUD Form 50058/50059 was not submitted to HUD by the POA
- The Form 50058/50059 data contained mismatched identifiers for the tenant so the SSA could not provide benefit information
- The Household is not due for re-certification in any of the months for which benefit data is provided online
- The Household does not fall under the jurisdiction of the selected PHA, Project, or Contract

9. If the SSA was unable to validate the identity of a family member, the screen will display a message as shown below. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.

"Error" message

benefit history reports

- by household
- by pha
- by fha contract
- by fha project

management reports

- by pha

resources

- help
- TASS User Guide
- download html

scissors

- about income verification
- reac
- hud home
- data definition
- download Adobe Acrobat

Household Income Summary

PHA: 'LA001' - Housing Authority of New Orleans
Re-certification Month: December, 2004

HH SSN: 003-77-9303 | HH Name: J**** DAV***** | [View Benefit History](#) [View Income Discrepancy](#)

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
003-03-0983	C***** DAV*****	\$0.00 \$0.00	\$564.00	\$0.00	\$564.00 \$564.00

Member SSN	Member Name	Error Description
003-77-9303	J**** DAV*****	Verification failed - SS benefits cannot be disclosed due to discrepancy in date of birth

[Back to Top](#)
[Privacy Statement](#)

Figure 17. Household Income Summary screen with Error Report



B. Accessing Monthly Reports by PHA

A search by PHA and Recertification Month will yield records for all the households under the PHA's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by PHA and Re-certification Month:

1. Click the **by pha** link under the Benefit History Reports section of the system menu.

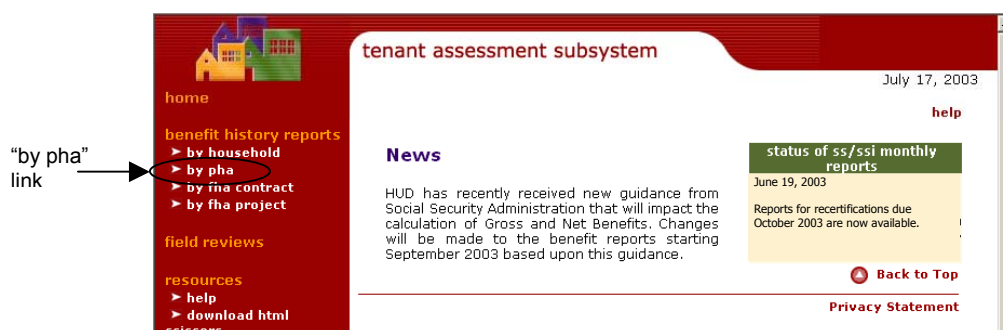


Figure 18. TASS Home Page



Note

If you get a message indicating that no PHA is assigned to you, you should contact the Secure Systems Coordinator of your PHA, who is able to grant you the necessary rights.

2. The **Monthly Reports by PHA** search screen is displayed as shown below.



Figure 19. Monthly Reports by PHA Search Screen



The **Select PHA** drop-down list is populated with the PHA(s) that you are authorized to access.

The **Select Program** drop-down list allows you to access reports for households participating in all PIH programs or to narrow your search to households participating in Public Housing or Section 8 programs.

The **Select Re-certification Month** drop-down list allows you to choose to view reports for households due for re-certification in the current month or in one of the four ensuing months.

3. To specify the group of households for which you want to access benefit records:
 - Select a **PHA** from the list of authorized PHAs
 - Select a specific category of rental assistance **program** or the default option “All PIH Programs”
 - Select the desired **Re-certification Month**
 - Click the **Go** link
4. The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Active links to available reports are shown in red

Monthly Reports By PHA		
Select PHA:	AL155 Housing Authority of the City of GREENVILLE	
Select Program:	All PIH Programs	
Select Re-certification Month:	February, 2005	
Go		
Monthly Reports Summary		
PHA	'AL155' - Housing Authority of the City of GREENVILLE	
Program	All PIH Programs	
Re-certification Month	February, 2005	
Report Type	Number of Households	Number of Members
Benefit History Reports	20	23
Income Discrepancy Reports	0	0
Error Reports	2	2
No Benefit Reports	12	23

Figure 20. Monthly Reports by PHA Summary screen

The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, Error and No SS/SSI Benefit Reports are available for the user-defined search criteria.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns.

If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.



B-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link.
The **Benefit Summary by PHA** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by PHA > Benefit Summary [help](#)

Benefit Summary by PHA	
PHA	'LA001' - Housing Authority of New Orleans
Program	All PIH Programs
Re-certification Month	February, 2005
Households Receiving Benefits	680

View Household: [1 - 50](#), [51 - 100](#), [101 - 150](#), [151 - 200](#), [201 - 250](#), [251 - 300](#), [301 - 350](#), [351 - 400](#), [401 - 450](#), [451 - 500](#), [501 - 550](#), [551 - 600](#), [601 - 650](#), [651 - 680](#)

1 - 50 of 680 Households [Next](#)

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 50](#)

HH SSN: 001-90-7996 HH Name: P***** BRD***** Sec.8 Certificates		Print PDF View Detail			
Member SSN	Member Name	*SS Gross Net	**SSI	+DE	Total Gross Net
UUU-51-6/91	J***** VAK*****	\$0.00 \$/14.00	\$0.00	\$0.00	\$0.00 \$/14.00

HH SSN: 000-81-6802 HH Name: A***** JOH***** Sec.8 Certificates		Print PDF View Detail			
Member SSN	Member Name	*SS Gross Net	**SSI	+DE	Total Gross Net
000-81-6802	A***** JOH*****	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00 \$0.00
003-93-4065	L***** MON*****	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00 \$0.00

Figure 21. Benefit Summary by PHA screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State
- Dual Entitlement (DE)
- Combined (SS, SSI, and DE) Gross and Net

The results are sorted by Program Type and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Benefit Summary by PHA screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.



B-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by PHA** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by PHA > Discrepancy Summary [help](#)

Discrepancy Summary by PHA	
PHA	'LA001' - Housing Authority of New Orleans
Program	All PIH Programs
Re-certification Month	February, 2005
Households With Income Discrepancy	66

View Household: [1 - 50](#), [51 - 66](#)

1 - 50 of 66 Households

Next

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 50](#)

HH SSN: 001-90-7996 HH Name: BRO***** Sec.8 Certificates			Print PDF	View Detail
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA	
001-90-7996	BRO*****	\$0.00	\$0.00	
000-51-6791	VAR*****	\$0.00	\$714.00	

HH SSN: 003-90-1320 HH Name: WES***** Sec.8 Mod Rehab			Print PDF	View Detail
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA	
003-90-1320	WES*****	\$0.00	\$0.00	
000-22-5919	WES*****	\$0.00	\$564.00	
003-96-7962	WES*****	\$0.00	\$0.00	
002-27-5875	PET*****	\$0.00	\$0.00	

Figure 22. Income Discrepancy Summary by PHA screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant
- Total Benefits Reported to HUD by the SSA

The results are sorted by Program Type and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Discrepancy Summary by PHA screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.



B-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by PHA > Error Reports

help

Error Reports by PHA

PHA	'LA001' - Housing Authority of New Orleans
Program	All PIH Programs
Re-certification Month	March, 2005
Households With Error	134

View Household: [1 - 50](#), [51 - 100](#), [101 - 134](#)

1 - 50 of 134 Households

Next

Error Reports Download Data

HH SSN: 000-04-0809 | HH Name: D***** ROB***** |

Member SSN	Member Name	Error Description
002-25-2677	K***** ROB*****	Member SSN not sent to SSA - Invalid SSN
002-25-2677	K***** ROB*****	Member SSN not sent to SSA - Invalid SSN

HH SSN: 000-13-7745 | HH Name: P**** COL***** |

Member SSN	Member Name	Error Description
001-09-9741	E**** CLA*****	Verification failed - Date of birth matched, but surname did not match with SSA records

HH SSN: 000-15-9119 | HH Name: M***** JOH***** |

Figure 23. Error Reports by PHA screen


The results are sorted by Program Type and Head of Household SSN.

2. The SSA is not able to validate a tenant's identity if the SSN/date of birth/surname combination does not match SSA records.
Also, TASS does not submit records to SSA where the SSN is shown to be invalid based on preliminary validation checks done by TASS or the household member is a live-in aide or a foster child.
3. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.

B-4 No SS/SSI Benefit Reports

1. To view the list of tenants whose identities were validated by the SSA but do not and have never received SS/SSI benefits., click the **No SS/SSI Benefit Reports** link.
The **No SS/SSI Benefits Reports** screen is displayed as shown below





Home

benefit history reports

- by household
- by pha
- by fha contract
- by fha project

management reports

- by pha

sources

- help
- TASS User Guide
- download html
- ssors
- about income
- ification
- reac
- hud home
- data definition
- download Adobe
- robat
- contact us
- SVES manual

pure systems main

nu

out

tenant assessment subsystem

January 12, 2005

Home > Monthly Reports > Monthly Reports by PHA > No SS/SSI Benefit Reports

[help](#)

No SS/SSI Benefit Reports by PHA	
PHA	'LA001' - Housing Authority of New Orleans
Program	Section 8
Re-certification Month	December, 2004
Households with No Benefits	484

View Household: [1 - 50](#), [51 - 100](#), [101 - 150](#), [151 - 200](#), [201 - 250](#), [251 - 300](#), [301 - 350](#), [351 - 400](#), [401 - 450](#), [451 - 484](#) [501 - 484](#) [551 - 484](#) [601 - 484](#) [651 - 484](#) [701 - 484](#)

1 - 50 of 484 Households [Next](#)

HH SSN: 000-01-4702 HH Name: A***** AUG*****		
Member SSN	Member Name	Description
000-01-4702	A***** AUG*****	No benefits reported by SSA
001-91-0543	T***** AUG*****	No benefits reported by SSA

HH SSN: 000-04-4398 HH Name: K**** BRO*****		
Member SSN	Member Name	Description
000-53-7545	D***** ROB*****	No benefits reported by SSA

HH SSN: 000-04-4844 HH Name: M***** SIM*****		
Member SSN	Member Name	Description
000-04-4844	M***** SIM*****	No benefits reported by SSA
001-58-9804	J***** SIM*****	No benefits reported by SSA
004-03-3406	R***** WIL*****	No benefits reported by SSA

Figure 24. No SS/SSI Benefits Reports by PHA

The results are sorted by Program Type and Head of Household SSN.



A. Accessing Monthly Reports by FHA Contract Number

A search by FHA Contract Number and Recertification Month will yield records for all the households under the O/A's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by FHA Contract Number and Re-certification Month:

1. Click the **by fha contract** link under the Benefit History Reports section of the system menu.

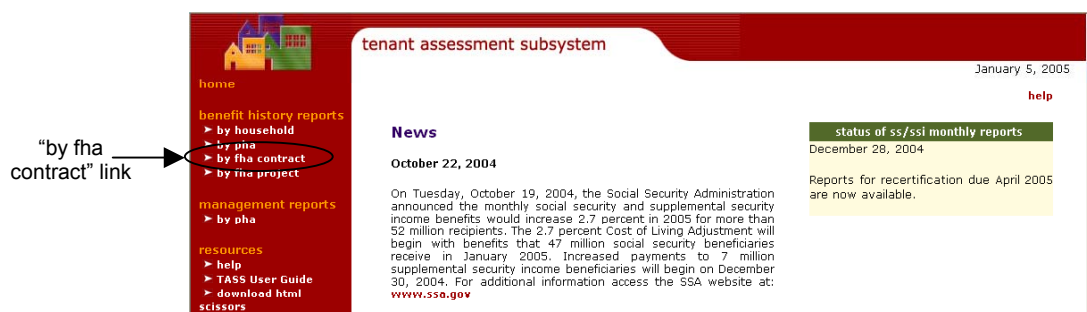
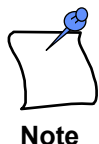


Figure 25. TASS Home Page



Note

If you get a message indicating that no contract numbers are assigned to you, contact the Secure Systems Coordinator of your organization who is able to provide you with the necessary rights.

2. The **Monthly Reports by Contract** screen is displayed as shown below.

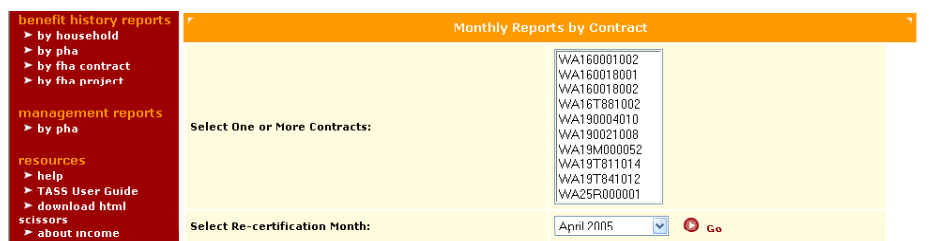


Figure 26. Monthly Reports by Contract Search Screen

The **Select One or More Contracts** drop-down list is populated with the contract(s) that you are authorized to access.



The **Select Re-certification Month** drop-down list allows you to choose reports for households due for re-certification in the current month or in one of the four ensuing months.



Note

If you do not see the contract number for a particular property you own or manage, you should contact the Secure Systems Coordinator of your organization.

- To specify the group of households for which you want to access benefit records:
 - Select one or more **Contract Numbers** from the list of authorized contracts
 - Select the desired **Re-certification Month**
 - Click the **Go** link



Note

You may choose multiple, consecutive contract numbers in the list by holding down the **Shift** key on your keyboard and selecting the required contract numbers by dragging the mouse through the list or using your **Up** or **Down arrows**. You may select multiple, nonconsecutive contract numbers by holding down the **Ctrl** key as you make the selections.

- The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Active links to available reports are shown in red

Monthly Reports Summary		
Contracts	WA160001002, WA160018001, WA160018002, WA16T881002, WA190004010, WA190021008, WA19MUUUU5Z, WA191811U14, WA191841U1Z, WA25RUUUUUI	
Re-certification Month	April 2005	
Report Type	Number of Households	Number of Members
Benefit History Reports	20	22
Income Discrepancy Reports	0	0
Error Reports	5	7
No Benefit Reports	7	17

Figure 27. Monthly Reports by Contract Summary Screen



The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, Error and No SS/SSI Benefits Reports are available for the specified contract number(s) and re-certification month.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns.

If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.

A-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link under the **Report Type** column.

The **Benefit Summary by Contract** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Contract > Benefit Summary [help](#)

Benefit Summary by Contract					
Contracts	WA160001002				
Re-certification Month	December 2004				
Households Receiving Benefits	11				

Summary Reports Detail Reports Download Data [Print PDF](#) 1 - 11

Benefit Summary for Contract: WA160001002

HH SSN: 002-24-5007 HH Name: Y**** BRO***** Print PDF View Detail				
Member SSN	Member Name	SS Gross Net	SSI	DE
002-24-5007	Y**** BRO*****	\$947.60 \$881.00	\$0.00	\$0.00
		\$947.60 \$881.00		

HH SSN: 000-07-8636 HH Name: R***** HER***** Print PDF View Detail				
Member SSN	Member Name	SS Gross Net	SSI	DE
000-07-8636	R***** HER*****	\$0.00 \$0.00	\$564.00	\$0.00
		\$564.00 \$564.00		

HH SSN: 001-91-5216 HH Name: M***** KAR***** Print PDF View Detail				
Member SSN	Member Name	SS Gross Net	SSI	DE
001-91-5216	M***** KAR*****	\$0.00 \$0.00	\$564.00	\$0.00
		\$564.00 \$564.00		

Figure 28. Benefit Summary by Contract Screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State
- Dual Entitlement (DE)



- Combined (SS, SSI, and DE) Gross and Net

The summaries are sorted by Contract Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Benefit Summary by Contract screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.

A-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by Contract** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Contract > Discrepancy Summary [help](#)

Discrepancy Summary by Contract

Contracts	WA160001002
Re-certification Month	December 2004
Households With Income Discrepancy	2

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 2](#)

Income Discrepancy Summary for Contract: WA160001002

HH SSN: 001-57-4800	HH Name: VAN*****	Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA	Print PDF	View Detail
001-57-4800	VAN*****			\$531.00	\$584.00		

HH SSN: 000-07-2542	HH Name: BAS*****	Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA	Print PDF	View Detail
000-07-2542	BAS*****			\$0.00	\$1,101.00		

[Back to Top](#) [Privacy Statement](#)

Figure 29. Income Discrepancy Summary by Contract screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant
- Total Benefits Reported to HUD by the SSA



The results are sorted by Contract Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Discrepancy Summary by Contract screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.

A-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Contract > Error Reports [help](#)

Error Reports by Contract	
Contracts	WA160001002, WA190004010, WA190021008
Re-certification Month	January 2005
Households With Error	4

[Error Reports](#) [Download Data](#)

Error Report for Contract: WA160001002

HH SSN: 004-24-1351 HH Name: V***** LYA*****		
Member SSN	Member Name	Error Description
003-66-1842	N**** YFI*****	Verification failed - SS and SSI benefits cannot be disclosed due to discrepancy in name

Error Report for Contract: WA190004010

HH SSN: 003-31-2435 HH Name: N*** Vn*****		
Member SSN	Member Name	Error Description
003-31-2435	N*** VO*****	Verification failed - SSI benefits cannot be disclosed due to discrepancy in date of birth

Error Report for Contract: WA190021008

HH SSN: 000-62-2743 HH Name: E***** MAR*****		
Member SSN	Member Name	Error Description

Figure 30. Error Report by Contract screen

The results are sorted by Contract Number and Head of Household SSN.

2. The SSA is not able to validate a tenant's identity if the SSN/date of birth/surname combination does not match SSA records.
Also, TASS does not submit records to SSA where the SSN is shown to be invalid



based on preliminary validation checks done by TASS or the household member is a live-in aide or a foster child.

3. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.

A-4 No SS/SSI Benefit Reports

1. To view the list of tenants whose identities were validated by the SSA but do not and have never received SS/SSI benefits, click the **No SS/SSI Benefit Reports** link. The **No SS/SSI Benefits Reports** screen is displayed as shown below.

tenant assessment subsystem		
January 5, 2005		
Home > Monthly Reports > Monthly Reports by Contract > No SS/SSI Benefit Reports		
No SS/SSI Benefit Reports by Contract		
Contracts	WA160001002, WA190021008	
Re-certification Month	January 2005	
Households With No Benefits	5	
No SS/SSI Benefit Reports for Contract: WA160001002		
HH SSN: 002-42-0153 HH Name: W***** BEV*****		
Member SSN	Member Name	Description
002-42-0153	W***** BEV*****	No benefits reported by SSA
HH SSN: 003-25-0373 HH Name: F***** TUR*****		
Member SSN	Member Name	Description
003-25-0373	F***** TUR*****	No benefits reported by SSA
HH SSN: 004-24-1351 HH Name: V***** LYA*****		
Member SSN	Member Name	Description
004-24-1351	V***** LYA*****	No benefits reported by SSA
No SS/SSI Benefit Reports for Contract: WA190021008		
HH SSN: 000-62-2743 HH Name: E***** MAR*****		
Member SSN	Member Name	Description
000-62-2743	E***** MAR*****	No benefits reported by SSA

Figure 31. No SS/SSI Benefits Reports by Contract

The results are sorted by Contract Number and Head of Household SSN.



B. Accessing Monthly Reports by FHA Project Number

A search by FHA Project Number and Recertification Month will yield records for all the households under the O/A's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by FHA Project Number and Re-certification Month:

1. Click the **by fha project** link under the **Benefit History reports** section of the system menu.

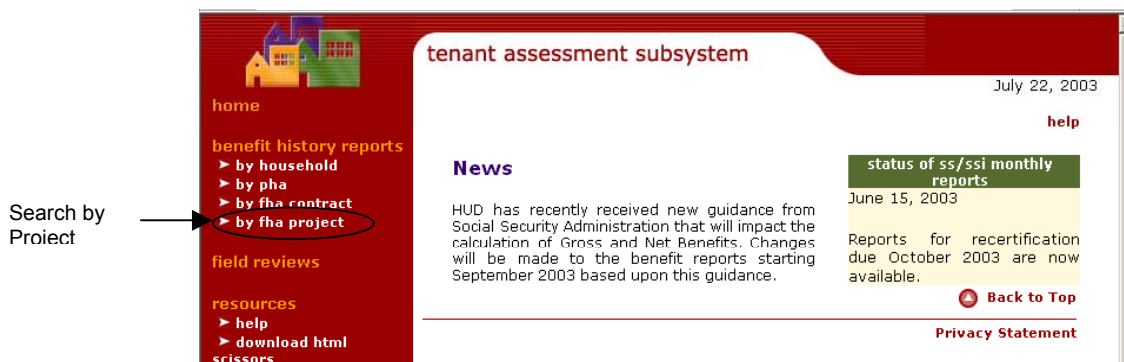


Figure 32. TASS Home Page



Note

If you get a message indicating that no projects are assigned to you, contact the Secure Systems Coordinator of your organization who is able to provide you with the necessary rights.

2. The **Monthly Reports by Project** screen is displayed as shown below.

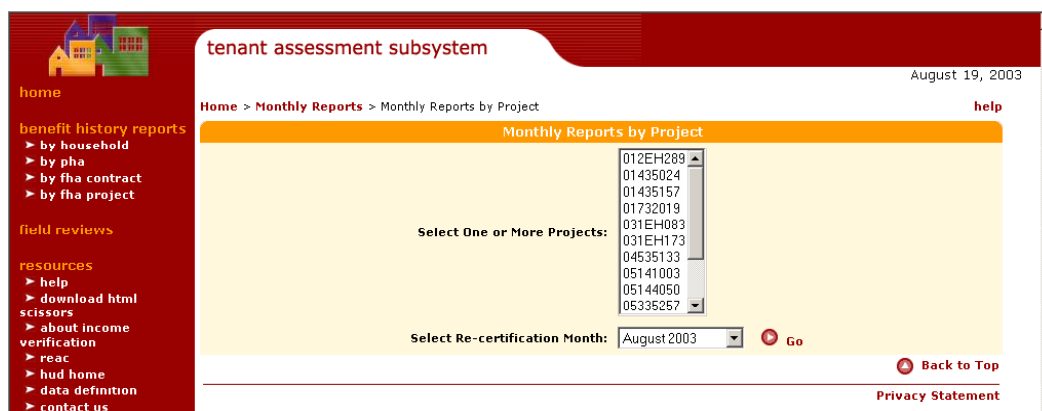


Figure 33. Monthly Reports by Project Search Screen



The **Select One or More Projects** drop-down list is populated with the project(s) that you are authorized to access.

The **Select Re-certification Month** drop-down list allows you to choose reports for households due for re-certification in the current month or in one of the four ensuing months.

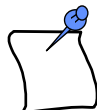


Note

If you do not see the project number for a particular property you own or manage, you should contact the Secure Systems Coordinator of your organization.

3. To specify the group of households for which you want to access benefit records:

- Select one or more **Project Numbers** from the list of authorized projects
- Select the desired **Re-certification Month**
- Click the **Go** link



Note

You may choose multiple, consecutive project numbers in the list by holding down the **Shift** key on your computer keyboard and selecting the required project numbers by dragging the mouse through the list or using your **Up** or **Down arrows**. You may select multiple, nonconsecutive project numbers by holding down the **Ctrl** key as you make the selections.

4. The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Monthly Reports Summary		
Projects	01435157, 01732019, 031EH083	
Re-certification Month	December 2004	
Report Type	Number of Households	Number of Members
Benefit History Reports	15	17
Income Discrepancy Reports	0	0
Error Reports	2	2
No Benefit Reports	14	31

Figure 34. Monthly Reports by Project Summary Screen



The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, Error and No SS/SSI Benefit Reports are available for the specified project number(s) and re-certification month.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns.

If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.

B-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link under the **Report Type** column.

The **Benefit Summary by Project** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Project > Benefit Summary [help](#)

Benefit Summary by Project

Projects	012EH289, 01435024, 01435157, 01732019, 031EH083, 031EH173, 04535133, 05141003, 05144050, 05335257, 05344237, 06241065, 12144100, 12335106
Re-certification Month	December 2004
Households Receiving Benefits	66

View Household: [1 - 50](#), [51 - 66](#)

1 - 50 of 66 Households [Next](#)

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 50](#)

Benefit Summary for Project: 01435157

HH SSN: 000-66-6420 HH Name: J*** WUL*****					Print PDF View Detail
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net
000-66-6420	J*** WUL*****	\$1,014.60 \$948.00	\$0.00	\$0.00	\$1,014.60 \$948.00

HH SSN: 000-22-4412 HH Name: J**** MAT*****					Print PDF View Detail
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net
000-10-2138	K*** MAT*****	\$0.00 \$0.00	\$563.50	\$0.00	\$563.50 \$563.50

Figure 35. Benefit Summary by Project Screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State



- Dual Entitlement (DE)
- Combined (SS, SSI, and DE) Gross and Net

The summaries are sorted by Project Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Benefit Summary by Project screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.

B-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by Project** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Project > Discrepancy Summary [help](#)

Discrepancy Summary by Project

Projects	031EH173, 05335257
Re-certification Month	December 2004
Households With Income Discrepancy	4

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 4](#)

Income Discrepancy Summary for Project: 031EH173

HH SSN: 000-09-2613 HH Name: FOR*****	Print PDF	View Detail	
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
000-09-2613	FOR*****	\$0.00	\$962.00

Income Discrepancy Summary for Project: 05335257

HH SSN: 002-45-9236 HH Name: PAT*****	Print PDF	View Detail	
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
002-45-9236	PAT*****	\$586.00	\$531.20
002-66-4608	PAT*****	\$0.00	\$501.00

Figure 36. Income Discrepancy Summary by Project screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant



- Total Benefits Reported to HUD by the SSA

The results are sorted by Project Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports. Also, you may access a specific group of 50 reports by using the **View Household** links shown at the top and bottom of the page.

2. The Discrepancy Summary by Project screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.

B-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

The screenshot shows the 'tenant assessment subsystem' interface. The sidebar on the left contains links for 'home', 'benefit history reports' (with sub-links for household, pha, fha contract, and fha project), 'management reports' (with sub-link for pha), 'resources' (with sub-links for help, TASS User Guide, download html, scissors, about income verification, reac, hud home, data definition, download Adobe Acrobat, contact us, and SVES manual), 'secure systems main menu', and 'logout'. The main content area is titled 'Error Reports by Project' and shows a summary table for Project 031EH173, 05335257, with 8 households with errors. Below this, there are two sections of error reports. The first section is for Project 031EH173 and lists two error entries: one for HH SSN 001-80-1727 where the SSA record was not found, and another for HH SSN 004-09-8157 where verification failed due to a name discrepancy. The second section is for Project 05335257 and lists one error entry for HH SSN 000-07-4206 where the member SSN was not sent to the SSA.

Projects	031EH173, 05335257
Re-certification Month	December 2004
Households With Error	8

HH SSN	HH Name	Error Description
001-80-1727	G**** SIM*****	Verification failed - SSN not found in SSA records
004-09-8157	D**** HIL*****	Verification failed - SS benefits cannot be disclosed due to discrepancy in name

HH SSN	HH Name	Error Description
000-07-4206	R**** HOW*****	Member SSN not sent to SSA - Invalid SSN

Figure 37. Error Reports by Project screen

The results are sorted by Project Number and Head of Household SSN.

2. The SSA is not able to validate a tenant's identity if the SSN/date of birth/surname combination does not match SSA records.
Also, TASS does not submit records to SSA where the SSN is shown to be invalid



based on preliminary validation checks done by TASS or the household member is a live-in aide or a foster child.

- Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.

B-4 No SS/SSI Benefit Reports

- To view the list of tenants whose identities were validated by the SSA but do not and have never received SS/SSI benefits, click the **No SS/SSI Benefit Reports** link. The **No SS/SSI Benefits Reports** screen is displayed as shown below.

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by Project > No SS/SSI Benefit Reports

help

No SS/SSI Benefit Reports by Project		
Projects	031EH173, 05335257	
Re-certification Month	December 2004	
Households With No Benefits	37	

No SS/SSI Benefit Reports for Project: 05335257

HH SSN: 000-07-4206 HH Name: R**** HOW*****	Member SSN	Member Name	Description
000-07-4206	R**** HOW*****		No benefits reported by SSA

HH SSN: 000-14-2064 HH Name: T**** JOY*****	Member SSN	Member Name	Description
000-14-2064	T**** JOY*****		No benefits reported by SSA
001-56-7870	T**** JOY*****		No benefits reported by SSA

HH SSN: 000-28-4409 HH Name: R***** MCC*****	Member SSN	Member Name	Description
000-28-4409	R***** MCC*****		No benefits reported by SSA

HH SSN: 000-38-8822 HH Name: B***** ROS*****	Member SSN	Member Name	Description
000-38-8822	B***** ROS*****		No benefits reported by SSA
001-87-3735	D***** ROS*****		No benefits reported by SSA

Figure 38. No SS/SSI Benefits Reports by Project

The results are sorted by Project Number and Head of Household SSN.



C. Accessing the Detailed Reports

The Benefit Summary and Discrepancy Summary screens provide three options for accessing the detailed Benefit History and Income Discrepancy Reports:

1. To view the detailed report for a specific household, click the **View Detail** link corresponding to the household on the summary page (Benefit Summary by PHA, Contract, or Project; Discrepancy Summary by PHA, Contract, or Project).

tenant assessment subsystem

January 5, 2005

Home > Monthly Reports > Monthly Reports by PHA > Benefit Summary [help](#)

Benefit Summary by PHA

PHA	'LA001' - Housing Authority of New Orleans
Program	All PIH Programs
Re-certification Month	February, 2005
Households Receiving Benefits	680

View Household: [1 - 50](#), [51 - 100](#), [101 - 150](#), [151 - 200](#), [201 - 250](#), [251 - 300](#), [301 - 350](#), [351 - 400](#), [401 - 450](#), [451 - 500](#), [501 - 550](#), [551 - 600](#), [601 - 650](#), [651 - 680](#)

1 - 50 of 680 Households [Next](#)

[Summary Reports](#) [Detail Reports](#) [Download Data](#) [Print PDF 1 - 50](#)

HH SSN: 001-90-7996 HH Name: P***** BRO***** Sec.8 Certificates	Print PDF	View Detail			
Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
000-51-6791	J***** VAR*****	\$0.00 \$714.00	\$0.00	\$0.00	\$0.00 \$714.00

HH SSN: 000-81-6802 HH Name: A***** JOH***** Sec.8 Certificates	Print PDF	View Detail			
Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
000-81-6802	A***** JOH*****	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00 \$0.00
003-93-4065	L***** MON*****	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00 \$0.00

Figure 39. Benefit Summary by PHA screen

- a. For Benefit History Reports, this displays the detailed Benefit History Report(s) for all members of the household, where available. The reports describe the Social Security, Supplemental Security Income, Medicare, Dual Entitlement, and Black Lung benefits being received by the tenant. It also provides a history of past benefit amounts.

The Benefit History Report page is shown below. The reports are sorted by Member Number with the Head of Household's report being the first on the page. Scroll down the page to view the individual reports for each family member. You may print the household's reports or save the report file to a local computer hard drive or diskette for later viewing and printing.

The reports may be viewed and printed in PDF format, by clicking the **Print PDF** link to the left of the View Detail link.



A sample Benefit History Report is shown in Appendices V (for PHAs) and VI (for O/As). Appendix VII contains a description of the data shown on the report.

BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2004/12] **FOR OFFICIAL USE ONLY**			
HA Code: LA001	Housing Authority: Housing Authority of New Orleans		
Project:	Program Type: Sec.8 Housing Choice Vouchers		
[For Reference Only]			
Head of Household:	W***** TAY*****	Address:	2334 CONTI ST NEW ORLEANS LA 70119-0000
SSN:	002-06-5747		
[Information below applies to this family member]			
Head of Household: 002-06-5747			
Family Member:	W***** TAY*****		
SSN:	002-06-5747	Date of Birth:	05/01/1948
Social Security Income Benefits			
Payment Status Code:	C - Current Payment Status	Benefit History	
Date of Current Entitlement:	09/1991	Date	Gross Benefit
Net Monthly Benefit if Payable:	\$794.00	12/2003	\$794.00 Credited
		12/2002	\$777.00 Credited

Figure 40. Benefit History Report Screen

- b. For Income Discrepancy Reports, this displays the detailed report for the household as shown below. The report details the tenant-reported benefit amount, the SSA-reported benefit amount, and the difference in the amounts for each family member and for the combined household. You may print the household's report or save the report file to a local computer hard drive or diskette for later viewing and printing.

A sample Income Discrepancy Report is shown in Appendices VIII (for PHAs) and IX (for O/As). Appendix X contains a description of the data shown on the report.

INCOME DISCREPANCY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2004/12] **FOR OFFICIAL USE ONLY**			
HA Code: LA001	Housing Authority: Housing Authority of New Orleans		
Project:	Program Type: Sec.8 Certificates		
Head of Household:	MIL*****	Address:	2522 LOUISA ST NEW ORLEANS LA 70117-0000
SSN:	001-69-6548		
Family Member:			
SSN	Name	Date of Birth	
001-69-6548	MIL*****	11/20/1964	
002-56-8051	JOH*****	01/20/1983	
Benefits Reported to HUD			
No Benefits Reported to HUD			
Benefits Reported by SSA			

Figure 41. Income Discrepancy Report Screen



Note

You should be aware that once a report is saved to your local diskette or hard drive, it is no longer in HUD's secure environment. **You must take precautions to prevent access to the reports by unauthorized individuals.**

- To view the detailed reports for all households in the result set, select the **Detail Reports** tab. The reports are presented in groups of 50 with navigation buttons for viewing the next and previous set of reports. The user may select a specific set of 50 reports by clicking one of the View Household links at the top or bottom of the page.

The screenshot shows the 'tenant assessment subsystem' interface. At the top, there's a navigation bar with 'Home > Monthly Reports > Monthly Reports by PHA > Benefit History Reports'. Below this, a table titled 'Benefit History Reports by PHA' shows details for PHA 'LA001' - Housing Authority of New Orleans, Program 'All PIH Programs', Re-certification Month 'February, 2005', and Households Receiving Benefits '680'. A 'View Household' section lists ranges from '1 - 50' to '651 - 680'. A 'Next' button is visible. Below the table, there are three tabs: 'Summary Reports', 'Detail Reports' (which is selected), and 'Download Data'. A 'Print PDF 1 - 50' link is also present. The 'Detail Reports' tab shows a 'BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2005/02]' with fields for HA Code, Housing Authority, Project, Program Type, Head of Household, SSN, and Address.

Links to view specific groups of reports

The Detail Reports tab

Figure 42. Summary Screen Showing Options for Viewing Report Details

The user may print or save the reports. The **Print PDF 1-50** link allows the user to open and print in PDF format the set of reports—a maximum of 50 reports at a time.



- To download the SS/SSI benefits, income discrepancy or error data, select the **Download Data** tab.

Name	Data Type (Length)	Description
stcd	varchar(2)	The first two characters in HA code
hacd	varchar(3)	Last three characters in HA code
hh_ssn	varchar(9)	Head of Household Social Security Number
program_type_code	varchar(2)	Type defined as follows: L = "Indian Housing (Low Rent)" M = "Indian Housing (Mutual Help)" B = "Indian Housing" CE = "Certificates" MR = "Mod Rehab" P = "Public Housing" VO = "Vouchers"

Figure 43. Benefit Data Download tab

You may download the data as a zipped file or an ASCII text file by clicking the appropriate link on the page. These download options are particularly useful for PHAs with a large volume of tenant reports or who wish to load the data into another program such as Microsoft Access. The zipped data file (compressed format) greatly reduces the size of large files and reduces the download time. The time it takes to download the files will depend on the speed of your Internet connection. See Appendix XIII for directions for downloading the data files.

The **Data Download** page displays the name, type, size and a brief description of each field in the Benefit History, Income Discrepancy and Error reports. The fields are listed in the order they are written to the downloadable files. This information is also available through the **Data Definition** link under the **Resources** caption of the TASS web page.



Note

The data files that may be downloaded from the TASS online system are in tab-delimited format. That is, a tab character separates each field. Each record is presented on a new line.